

VINE

VALUES-BASED INVESTING
NETWORK EXCHANGE

APRIL 3 - 5, 2025

Charleston, South Carolina

Please join us for our inaugural event designed to bring together financial leaders from faith-based institutions across the country. This event will focus on faith-based investing themes, while exploring the beautiful, historic city of Charleston.

TOPICS INCLUDE:

Building a successful endowment/cash reserve program

How to construct an investment portfolio

Discussing investment strategy with peers

THURSDAY, APRIL 3RD, 2025

6:00PM

Welcome Reception
The Greenhouse at Hotel Emeline

FRIDAY, APRIL 4TH, 2025

8:00AM

Breakfast & Morning Devotional

9:30AM

Intermission

10:00AM

PermCap Client Perspective: Building an Endowment from the Foundation Up
Speaker: Jeff Benson, Investment Committee Chairman at Liberty University

11:00AM

PermCap Market Update
Speakers: John Regan and Connor Carew

12:00PM

Lunch & Roundtable Discussion

1:30PM

Creating a Strong Governance Structure for Your Organization

3:00PM

Asset Allocation Construction: The Driver of Returns

3:30PM

Coffee Break: Refreshments and Pastries Catered from Harken

4:00PM

PermCap Client Perspective: Building a Cash Reserve Program for a Local Church
Speakers: Amy Nikkel, CFO at Life.Church and Jerry Hurley, Team Development Leader & Pastor at Life.Church

5:00PM

Family Wealth Spanning Generations: How to Be a Good Steward of Your Resources

7:00PM

Dinner at Lewis Barbecue

SATURDAY, APRIL 5TH, 2025

10:00AM

Charleston Activities:
Boat Tour Around the City
Cooking Class with Local Chef
Local Food Tour

SUNDAY, APRIL 6TH, 2025: DEPARTURE